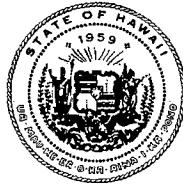


NEIL ABERCROMBIE  
GOVERNOR



HAKIM OUANSAFI  
EXECUTIVE DIRECTOR

**STATE OF HAWAII**  
DEPARTMENT OF HUMAN SERVICES  
HAWAII PUBLIC HOUSING AUTHORITY  
1002 NORTH SCHOOL STREET  
POST OFFICE BOX 17907  
Honolulu, Hawaii 96817  
November 22, 2013

BARBARA E. ARASHIRO  
EXECUTIVE ASSISTANT

IN REPLY PLEASE REFER TO:  
13:CPO/283

TO: Interested Parties

FROM: Rick T. Sogawa   
Procurement Officer

SUBJECT: Request-for-Proposals, No. PMB-2013-13, Addendum No. 2  
Property Management, Maintenance and Resident Services – MU 42

This Addendum No. 2 is to: 1) provide additional information; and 2) inform interested parties that no written questions were received by the Hawaii Public Housing Authority (HPHA) up until November 20, 2013.

1. Number of Vacant Units, as of October 2013:

Property	Studio	One Bedroom
Hale Po`ai	0	0
La`iola	0	0
Kamalu	0	0
Ho`olulu	0	0
Halia Hale	0	0

2. Occupancy Rate, as of October 2013:

Property	Occupancy Rate (%)
Hale Po`ai	100
La`iola	100
Kamalu	100
Ho`olulu	100
Halia Hale	100

3. Delinquency Rate, as of October 2013 – 1.0%
4. Rent Collection Rate, as of October 2013 – 99%
5. Rent Roll, as of October 2013 – \$179,937
6. Tenant Association:

Property	Recognized by the HPHA	Active
Hale Po`ai	n/a	No
La`iola	n/a	No
Kamalu	n/a	No
Ho`olulu	n/a	No
Halia Hale	n/a	No

7. Attached please find the 11/13/13 Pre-Proposal Conference meeting minutes.
8. Attached for your information is a sample monthly monitoring form used to calculate the monthly management fee.

If you have any questions, please call contact Rick Sogawa, RFP Coordinator at (808) 832-6038. Thank you.



## **Pre-Proposal Conference Minutes**

Property Management, Maintenance, and Resident Services for the State-Aided Elderly Housing  
Properties under Management Unit 42 on the Island of Oahu

RFP PMB – 2013-13

November 13, 2013 – 9:00am

Location: Hawaii Public Housing Authority (HPHA)  
Bldg. E  
1002 N. School Street  
Honolulu, Hawaii 96817

### **I. Welcome**

- A. Welcome by the HPHA – Rick Sogawa, RFP Coordinator
- B. Introduction of HPHA Staff:
  - (1) Tammie Wong – Contract Specialist
  - (2) Earl Nakaya – Contract Administrator
  - (3) Kathy Mitchell – Contract Specialist

### **II. Section 1: Administrative Overview**

- A. The Point of Contact (POC) for all communications related to the RFP is Rick Sogawa, who oversees the procurement and issuance of the contract.
- B. After contract execution, Earl Nakaya will be the POC and Contract Administrator, who will oversee and monitor the contract throughout the contract period.
- C. Important Dates:
  - (1) Proposal submittal deadline is 4:00 p.m., Hawaii Standard Time, 12/9/2013 at HPHA, Bldg. D, Central Files Office ;
  - (2) Written Questions are due on 11/20/2013 via email or fax to the RFP Coordinator, who will then respond to questions in writing through issuance of an addendum on 11/22/2013;
  - (3) December/January award selection; and
  - (4) Contract start date is 1/31/2014
- D. There will be no public opening of proposals under this method of procurement.
- E. Interested Offerors shall ensure Wage and Labor Law Compliance (reference Page 4, paragraph D). Contracts in excess of \$25,000 shall certify and submit Attachment 18 with their proposal.

- F. Proposals shall be hard copies and spiral bound when submitted. Clearly seal and mark the outside of the proposal package with the RFP number and company name before submitting to HPHA Central Files Office in Building D.
- G. Notice of Award and Notice of Non-Award letters will be issued to the Successful Offeror as well as the other Interested Offerors along with a copy of their Evaluation Summary Scoresheet.
- H. Any protests must be in accord with the RFP and shall be submitted to the Executive Director of the HPHA within 5 working days of non-award notification date.
- I. Sample Contract, General Conditions, Special Conditions, Federal and State regulations are provided in the RFP as attachments, please review and submit questions in writing by the deadline.
- J. A sample of the Monthly Monitoring Report (MMR) will be included in an Addendum to follow, Interested Offerors were informed it is their responsibility to check the HPHA website for any changes or additional information to the RFP PMB 2013-13.

### **III. Section 2: Scope of Work and Specifications**

- A. MU 42 consist of 5 properties designated as family and are federally funded. There are a total of 576 units all of which are classified as elderly properties.
- B. Qualifying Requirements (reference pages 13-19):
  - (1) Proof of compliance with Hawaii State laws
  - (2) Indemnification
  - (3) Insurance Requirements
  - (4) Real Estate Broker's License
  - (5) Fidelity Bond Requirements
- C. Attachment 17 will be revised via an Addendum to reflect a multi-term contract with initial 12-month period and up to 48 months of extension, each extension period not to exceed 12 months. The Addendum will be posted to the HPHA website.
- D. Scope of Work (reference pages 12-36):
  - (1) Throughout this Section, clarification was made to limit rent delinquencies to not more than 2% for each property;
  - (2) Clarification was made to Maintain occupancy rate of 98% or higher for each property;
  - (3) Item IV, 2., g. – The hiring/appointment of the MU 42 Area Manager to oversee the properties requires HPHA concurrence.
  - (4) More information regarding the dwelling unit for the resident/maintenance manager's will be included in the Addendum following the pre-proposal conference.

- (5) At all 4 properties, HPHA will provide the office space, equipment, and supplies (page 27).
- (6) Request for Payment shall be made by the Contractor once a month. HPHA shall have thirty (30) calendar days after receipt of invoice or satisfactory delivery of goods or performance of services to make payment. Final payment requires proof of Compliance (page 28).
- (7) Two major changes in RFP compared to prior solicitations:
  - a. Use of designated HPHA Checking Account(Impress Account) for payment of operating expenses. The selected Contractor shall:
    - i. Submit monthly purchase documentations to E. Nakaya and requests to reimburse the checking account.
    - ii. Submit procurement policy to the HPHA which shall demonstrate competitive process; for purchases over \$15,000, HPHA to procure.
  - b. Income Re-examinations of tenants eligibility and rent determination shall be completed 60 days prior to the previous certification; the person conducting the recertification must be Certified Occupancy and Rent Collection; best to have a 3<sup>rd</sup> Party conduct this process.
- (8) Evictions follow the State Landlord & Tenant Code.
- (9) Correction through issuance of an addendum: vacant units to be in a marketable condition and ready for occupancy and leased within 7 working days ( see item 6.g. on Page 37).
- (10) Tentative exterior and interior improvements may be scheduled, which may involve relocation of tenants (reference pages 35 - 36).

#### **IV. Section 3: Proposal Forms and Instructions**

- A. Interested Offeror shall submit an original and 3 copies of the proposal; proposal shall be sealed, bound and consecutively numbered, 8 sections total (reference page 40).
- B. Proposal shall be submitted in sealed packaging clearly marked with RFP name, company name, contact name, phone number and fax number.
- C. A transmittal letter is required.
- D. An Addendum relating to the Management fee will be posted addressing a cost allocation of the fee (six criteria for earned fee based on occupancy and performance). The fee shall be a flat monthly fixed fee under MU 42; State-aided properties, have no cap on the management fee.
- E. Management fee cannot be claimed for prior month if not earned during the month.

**V. Section 4: Proposal Evaluation and Award**

- A. Evaluation based on a 100 point scale (reference pages 47-48).
- B. Price proposal is the only evaluation category that is not subjected to evaluation committees' scoring, lowest proposal gets the full 10 points; the remaining proposals are rated according to the formula on page 49.

**VI. Section 5: Attachments**

- A. Attachments 4- 7 address the expectations of the selected Contractor.
- B. Clarification was made that Attachment 6, §17-2021 relating to grievance procedure is not applicable to State-aided properties and shall be deleted.
- C. Attachment 17, the Price Proposal will be revised and the Addendum will be posted on the HPHA website.
- D. Attachment 20. Costs to be reimbursed and paid from the Management Fee shall be revised and the Addendum shall be posted on the HPHA website.
- E. Attachment 22, the Application Identification Form shall be revised to reflect the correct due date of December 9, 2013 and the Addendum shall be posted on the HPHA website.
- F. Include HPHA regulations related to evictions, pet allowances, sample contract documents, sample operating budget, sample price proposal budget, etc.
- G. Price proposal budget
  - (1) Project 60 months, broken down by property and 12-month periods.
  - (2) Award based on 60-month price.
  - (3) No price negotiation for extension periods.
  - (4) HPHA provided the dollar amounts for operating income and expenses , based on the provided income and expenditures, build in your price, MU 42 needs to sustain itself, net has to be zero or better.
  - (5) Income and expenditures amounts provided on Attachment 17 are required to be used, need to demonstrate that we can afford your price.
- H. Wage Certificate (Attachment 18) – required with proposal submission.
- I. Examples of project reimbursable costs and management fees (see Addendum).

- J. Observed 2013/2014 State Holidays (Attachment 22) – HPHA honors these state holidays for MU 42, property offices can be closed. However, State furlough does not apply to contractors.

**VII. Questions**

- A. Questions shall be submitted in writing by and will be responded via issuance of an addendum on 11/22/2013.

Following the Pre-Proposal Conference, the HPHA conducted on-site visits to Hale Po`ai, Halia Hale, La`iola, and Kamalu and Ho`olulu properties.

# HPHA – Property Management and Maintenance Services Branch AMP Monthly Monitoring Report

Date: \_\_\_\_\_

Contractor: \_\_\_\_\_

Contract No. **PMB** \_\_\_\_\_

AMP No.: \_\_\_\_\_

Management Fee MO/YR: \_\_\_\_\_

## ADMINISTRATIVE REQUIREMENTS

Activity	Standard	Actual	Satisfactory (Y/N)	Corrective Action Plan	Comments
Supervisor's Review	10%				
Re-exams	5% or below				
EIV Discrepancy	Due by End of Month				AMPs submit monthly
Community Service	At placement and annually reviewed				AMPs submit monthly
Crime Reports	Incidents logged and semi annual reporting				Semi annual
Pre-Rent Run	Due by Rent Run				
Occupancy Rate	97% or greater				



# HPHA – Property Management and Maintenance Services Branch AMP Monthly Monitoring Report

## RENT COLLECTION & TENANT ACCOUNT RECEIVABLES

Activity	Standard	Actual	Satisfactory (Y/N)	Corrective Action Plan	Comments
Delinquency Rate	3% or below				Current Tenant Status Report
90 Day Accounts	All accounts following rent collection policy				Aged Receivables

## VACANT UNIT TURNOVER

Activity	Standard	Actual	Satisfactory (Y/N)	Corrective Action Plan	Comments
Total Turnover Days/# of Placements	7 Days or less				PHAS Unit Turnaround Report

## WORK ORDERS

Activity	Standard	Actual	Satisfactory (Y/N)	Corrective Action Plan	Comments
Emergency Work Orders	Closed/ Abated within 24 hrs				PHAS Work Order Worksheet
Non-Emergency Work Orders	Average Closed within 25 Days or Less				PHAS Work Order Worksheet

# HPHA – Property Management and Maintenance Services Branch AMP Monthly Monitoring Report

## ROUTINE AND PREVENTIVE MAINTENANCE

Inspections	Scheduled	Completed	Satisfactory (Y/N)	Corrective Action Plan	Comments
Units					Annual Inspections Report
Buildings					Annual Inspections Report
Site					Annual Inspections Report

## UNIT, COMMON AREA & GROUNDS

Site Visit Date	Site Name	Conducted by	Satisfactory(Y/N)	Corrective Action Plan	Comments
				Continue Site Visits	

HPHA – Property Management and Maintenance Services Branch  
AMP Monthly Monitoring Report

MANAGEMENT FEE CALCULATION:

MONTHLY FEE: \_\_\_\_\_

WITHHOLDING:

Administrative:	_____
Rent Collection:	_____
Unit Turnover:	_____
Work Orders:	_____
Routine and Preventive Maint.:	_____
Unit, Common Area, Grounds:	_____

(10%)  
(20%)  
(20%)  
(20%)  
(20%)  
(10%)

Monthly Retainage \_\_\_\_\_

(5%)

Total Withholding: \_\_\_\_\_

NET MANAGEMENT FEE: \_\_\_\_\_

Report Completed by: \_\_\_\_\_ Phone No. \_\_\_\_\_

OIC Signature: \_\_\_\_\_ Phone No. \_\_\_\_\_